**Benchmark Ib.3.3:** Develop and implement eWiSACWIS documentation and templates needed. **Evidence of Completion:** Summary report of eWiSACWIS changes made

# **Subsidized Guardianship**

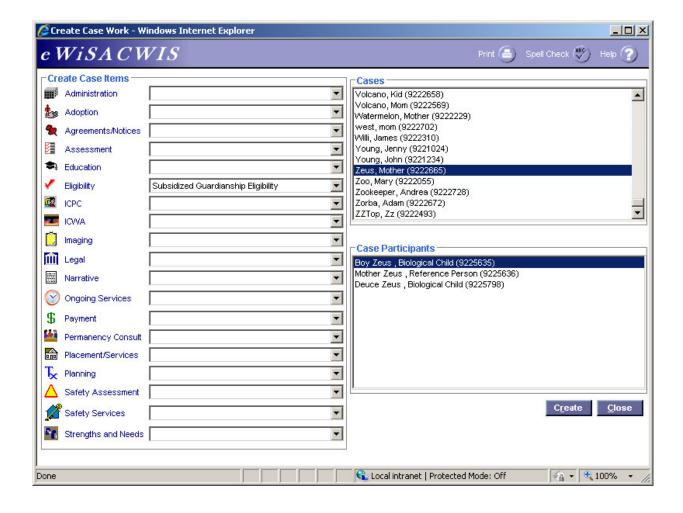
**Note:** In order to document all work for subsidized guardianship, an assignment to the case is needed.

#### Introduction

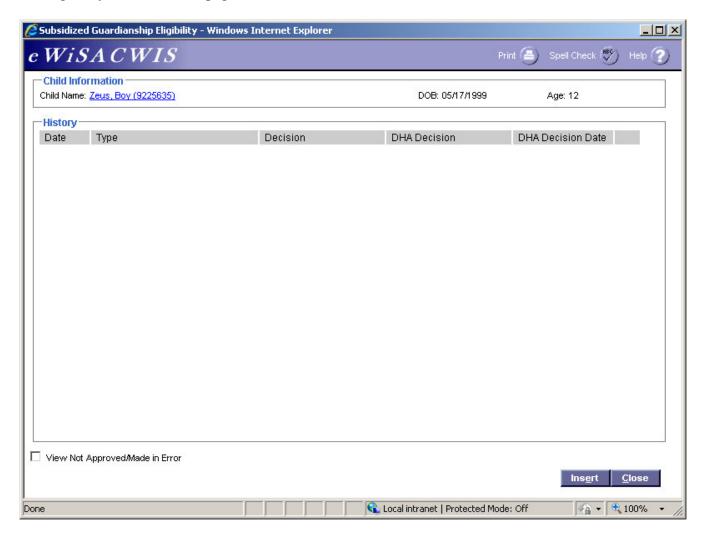
The Subsidized Guardianship functionality in eWiSACWIS tracks children that are a part of the IV-E Subsidized Guardianship program. These children are currently a part of a family case and are placed in an out of home placement with a relative or like-kin. Once the decision has been made for the child to achieve permanence through a guardianship that is eligible for the Subsidized Guardianship program and all information is documented related to that eligibility, the child is deactivated from the biological family case for reason of 'Subsidized Guardianship' similar to how a child is deactivated from a case for reason of 'TPR.' Once a child is deactivated, an overnight process will end the current Out of Home Placement in the biological family case and will create a Subsidized Guardianship Service in the Subsidized Guardianship case. The following eWiSACWIS information supports the Subsidized Guardianship program and the creation of the Subsidized Guardianship case.

# **Documenting an Initial Subsidized Guardianship Determination**

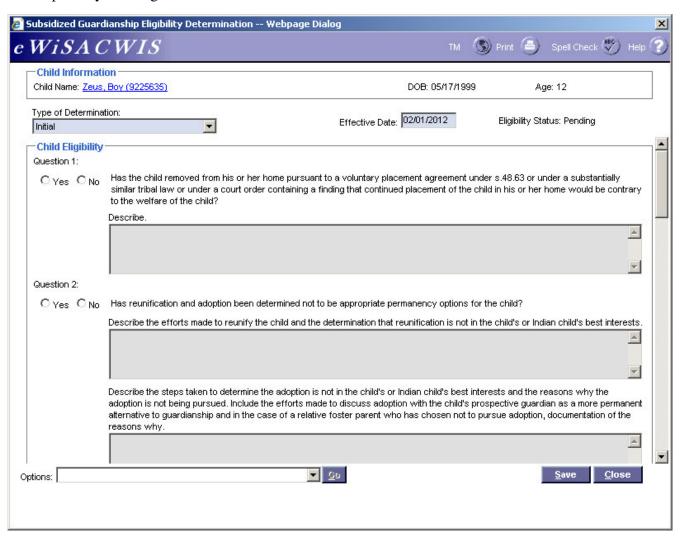
- 1. From your desktop, go up to Create > Case Work or click the Case Work button Work open the Create Case Work page.
- 2. On the Create Case Work page, select Subsidized Guardianship Eligibility from the Eligibility drop-down field. Then select the appropriate case and case participant. Click the Create button. This will open the Subsidized Guardianship Eligibility page.



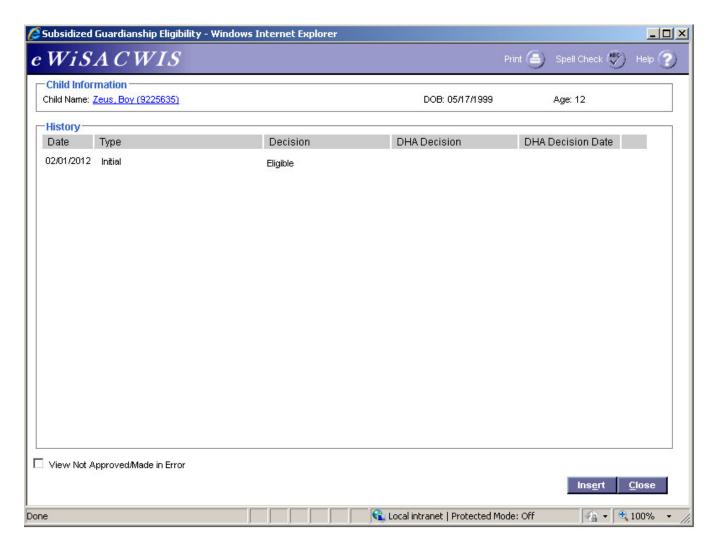
3. Click the Insert button on the Subsidized Guardianship Eligibility page to create the initial Subsidized Guardianship Eligibility Determination. This will open the Subsidized Guardianship Eligibility Determination page.



- 4. On the Subsidized Guardianship Eligibility Determination page, select Initial from the Type of Determination drop-down and enter an Effective Date.
- 5. Make the appropriate Yes or No selection for each question listed on the page. If there is a narrative text field associated with a question, the narrative is only required when a question is answered Yes. Once all of the questions have been answered, click the Save button. The Eligibility Status will be updated to either 'Eligible' or 'Not Eligible.'
  - **Note:** If the child is not an Indian child then Question 3 will be ignored when determining the Subsidized Guardianship eligibility status. If the child is under the age of 14 then Question 6 will be ignored when determining the Subsidized Guardianship eligibility status.
- 6. After the Eligibility Status has been updated, select SG Eligibility Determination and Permanency Plan Addendum from the Options drop-down and click the Go button. This will launch the template associated with the initial determination. Once the template has been viewed and printed, close the template by clicking the Close and Return to eWiSACWIS button.



- 7. Once the eligibility status has been determined the determination record can be approved. Select Approval from the Options drop-down and click Go. On the Approval History page, select the Approve radio button and click Continue. You are returned to the Subsidized Guardianship Eligibility Determination page. Click Save to send the determination for approval to your supervisor.
- 8. Click Close to return to the Subsidized Guardianship Eligibility page.



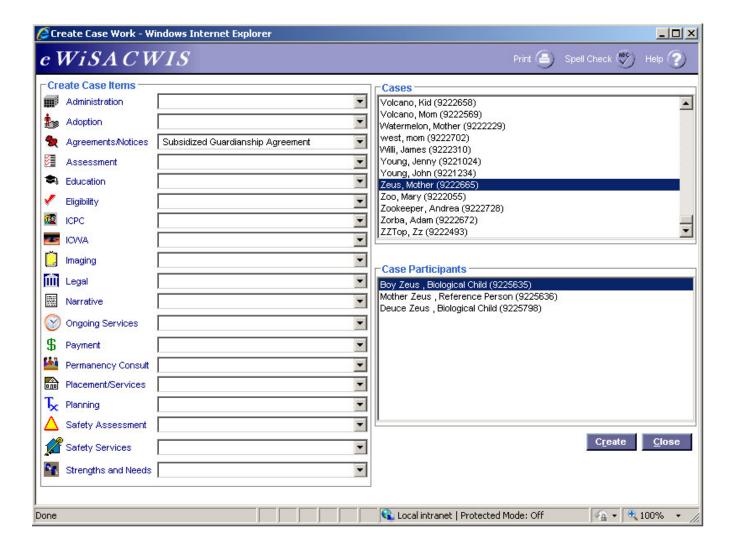
- 9. On the Subsidized Guardianship Eligibility page, click Close.
- 10. A link to the Subsidized Guardianship Eligibility record for the child will display under the Eligibility section of the case outliner.



#### **Creating a Subsidized Guardianship Agreement**

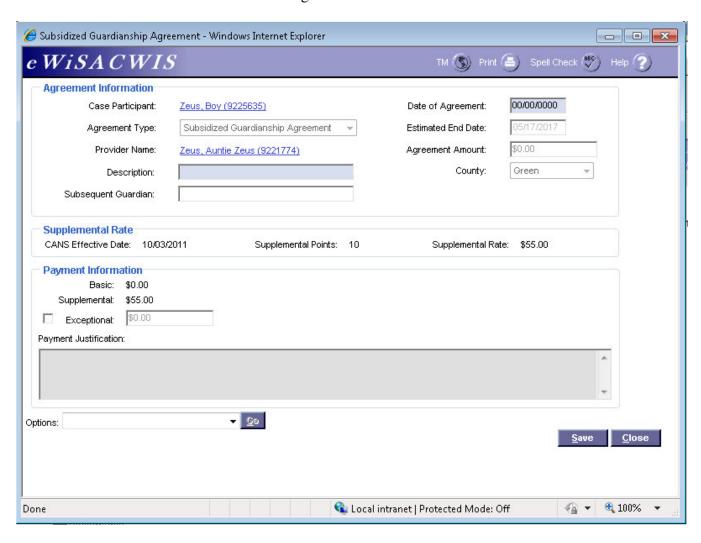
- 1. From your desktop, go up to Create > Case Work or click the Case Work button work. This will open the Create Case Work page.
- 2. On the Create Case Work page, select Subsidized Guardianship Agreement from the Agreements/Notices drop-down. Select the appropriate Case and the Case Participant. Click Create. This will open the Subsidized Guardianship Agreement page.

**Note:** The Subsidized Guardianship Agreement can only be created in the case that houses the Out of Home Placement and only if a CANS and Foster Care Rate (except Level 1) was created for that placement.

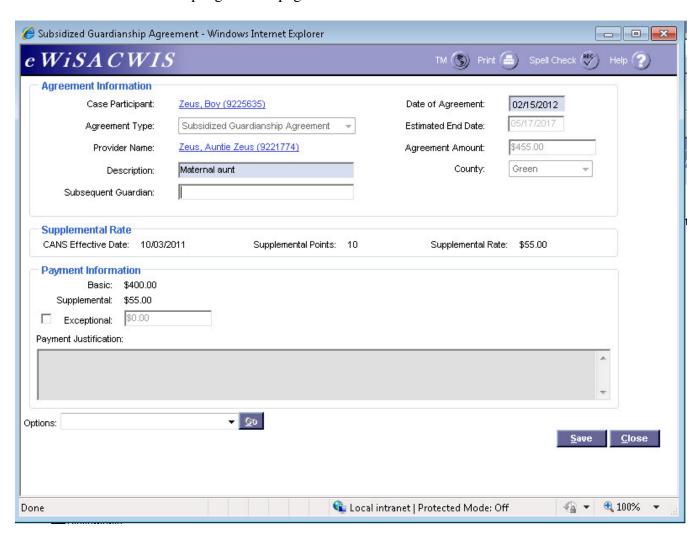


3. The Agreement Information group box captures basic information about the Subsidized Guardianship Agreement. The Provider name field pre-fills with the name of the provider the child is currently placed with or last placed with. The Estimated End Date field is pre-filled with the child's 18<sup>th</sup> birthday. The Date of Agreement is required. Enter the date. The Description field is required and used to capture a description of the Provider Relationship. If applicable, type the name of the Subsequent Guardian in the Subsequent Guardian field. The agreement payment amount in the Agreement Amount field is system derived from the total of the Basic, Supplemental, and Exceptional amounts.

**Note:** The provider associated with the agreement will automatically have the subsidized guardianship service type associated with it once the agreement is approved if the provider status is open. If the provider status is not open, the service type will need to be manually added. An overnight eWiSACWIS process will use the agreement information to setup the effective date, provider, and payment amount in the Subsidized Guardianship case once the child is deactivated from the biological case.



- 4. The data in the Supplemental Rate group box is system derived based on the child's most recently approved CANS linked to the child's most recently approved placement. In the Payment Information group box, the Basic field is pre-filled based on the uniform foster care rate for the child's age as of the Date of Agreement. Selecting the Exceptional checkbox will require an exceptional amount to be entered and a Payment Justification.
- 5. Once all applicable data has been entered, select Subsidized Guardianship Agreement from the Options drop-down and click Go to open the template.
- 6. Select the Approval option via the Options drop-down and click Go to approve the agreement. On the Approval History page, select the Approve radio button and click Continue to return to the Subsidized Guardianship Agreement page. Click Save and Close.

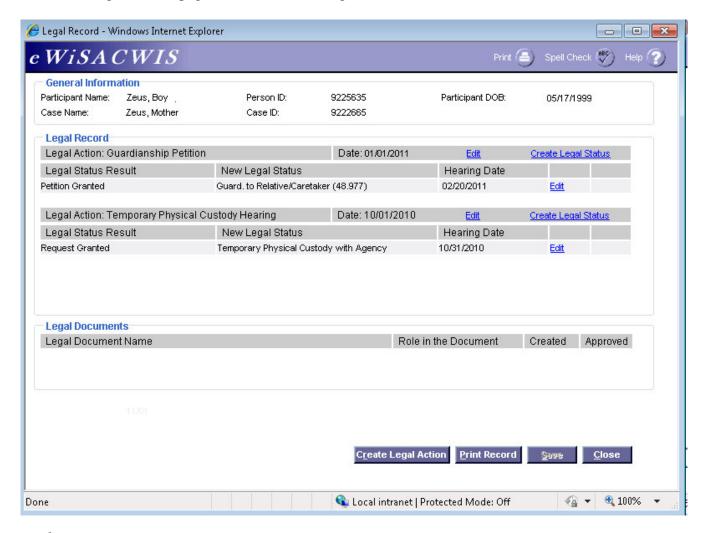


# Creating a Legal Action Record for Subsidized Guardianship

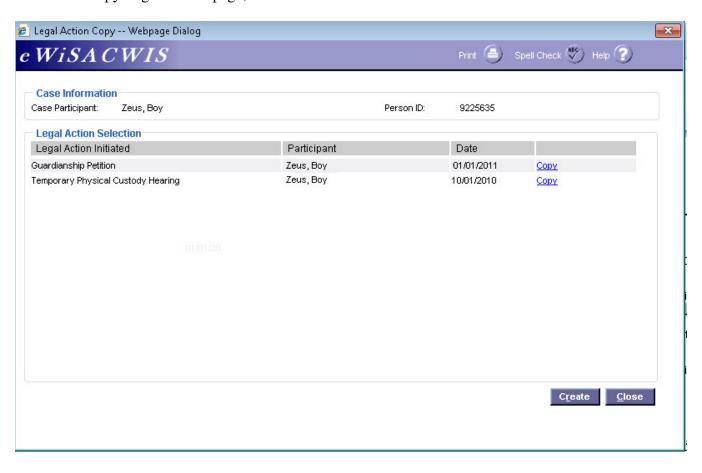
1. From your desktop, open the child's Legal Record. See the Legal Record Quick Reference Guide in order to create a Legal Record.



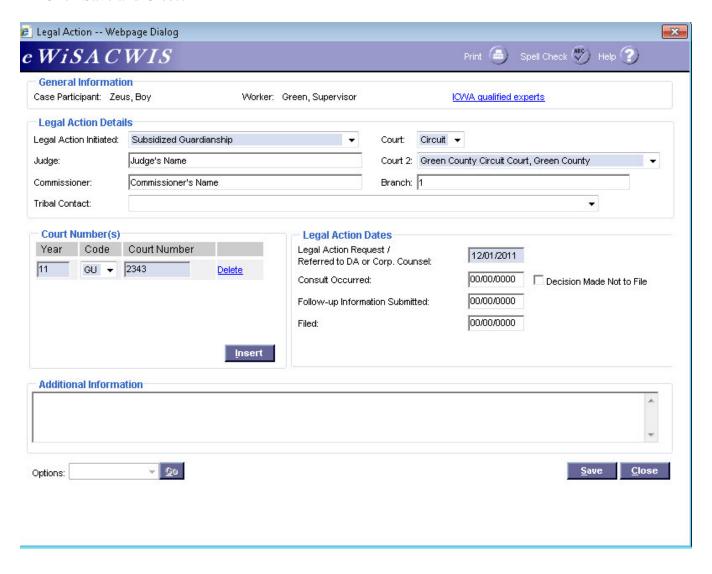
2. On the Legal Record page, click the Create Legal Action button.



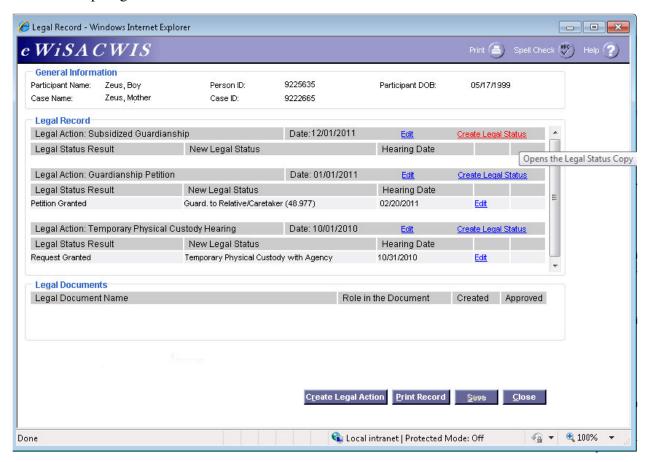
3. On the Copy Legal Action page, click Create.



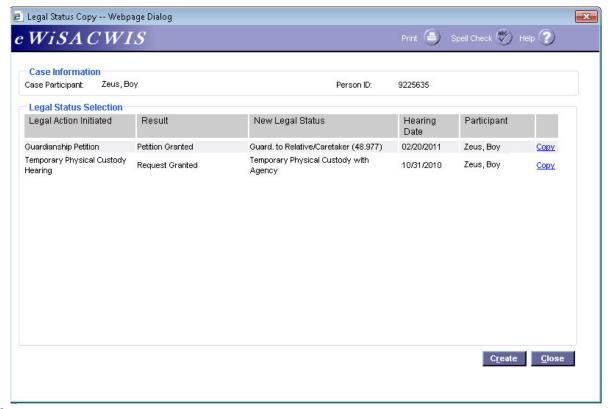
4. On the Legal Action page, enter data in the required fields for the Subsidized Guardianship action. Click Save and Close.



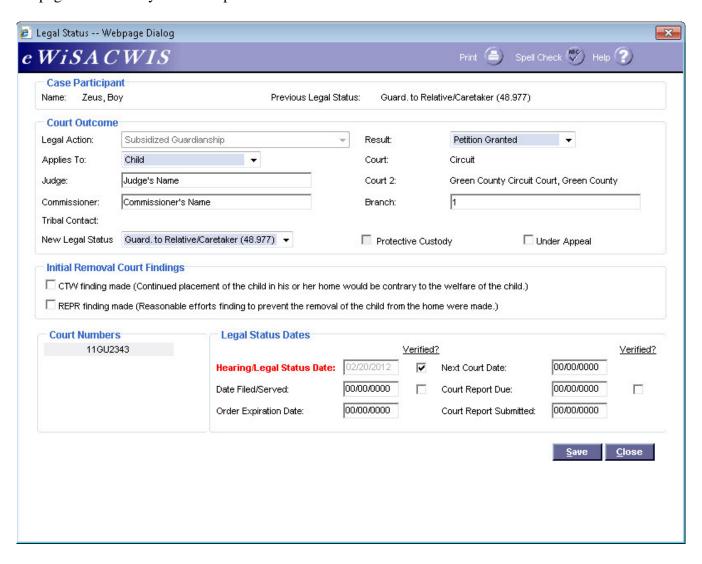
5. On the Legal Record page, click the Create Legal Status hyperlink next to the associated Subsidized Guardianship Legal Action.



6. On the Legal Action Copy page, click the Create button.



7. On the Legal Status page, enter data in the required fields. Select Guard. To Relative/Caregiver (48.977) for the New Legal Status. Click Save then Close. Then click Close on the Legal Record page to return to your desktop.

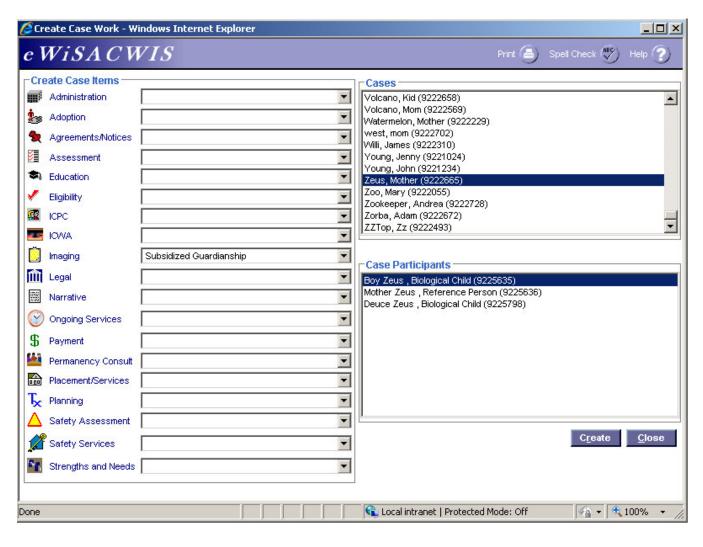


#### **Creating Imaging Records for Subsidized Guardianship**

1. From your desktop, go up to Create > Case Work or click the Case Work button Work open the Create Case Work page.

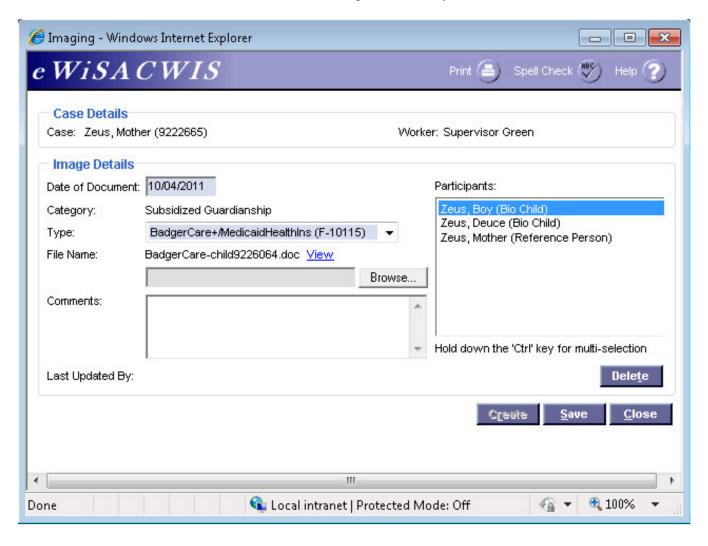
**Note:** The Imaging page can also be accessed via the Imaging Search page. Please see the associated Imaging Quick Reference Guide.

2. On the Create Case Work page, select Subsidized Guardianship from the Imaging drop-down. Select the appropriate Case and the Case Participant. Click Create. This will open the Imaging page.



3. For Subsidized Guardianship, imaging records must be created under the Subsidized Guardianship category with a Date of Document that falls within the past 6 months prior to deactivating the child to create the Subsidized Guardianship case. There are 7 types of Subsidized Guardianship documents: BadgerCare+/Medicaid Health Insurance Form (F-10115), Guardianship Order, Initial Court Order, Most Recent Court Order, Signed Subsidized Guardianship Agreement (DCF-F-CFS2365-E), Signed UFCR Setting (DCF-F-CFS834-E), and Signed Subsidized Guardianship Eligibility Determination and Permanency Plan Addendum (DCF-F-2691-E).

**Note:** For the Initial Court Order, enter today's date as the Date of Document. If the Most Recent Court Order is also more than 6 months ago, enter today's date as the Date of Document.

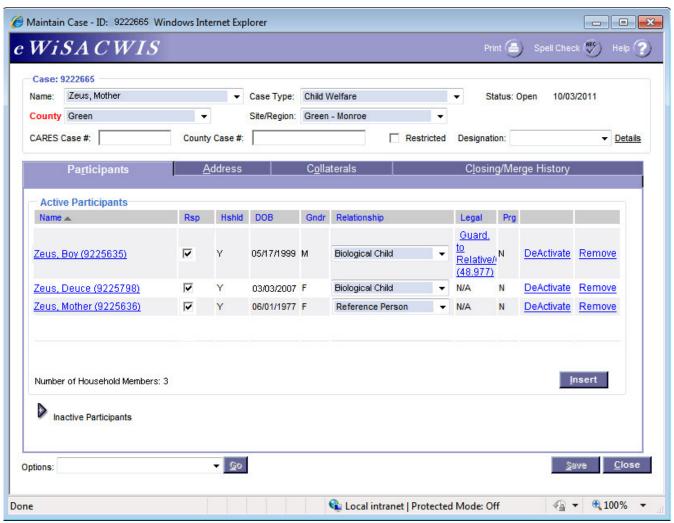


# Deactivating a Child Due to Subsidized Guardianship

1. From your desktop, click on the appropriate case name for the child who is to be deactivated for Subsidized Guardianship. This will open the Maintain Case page.

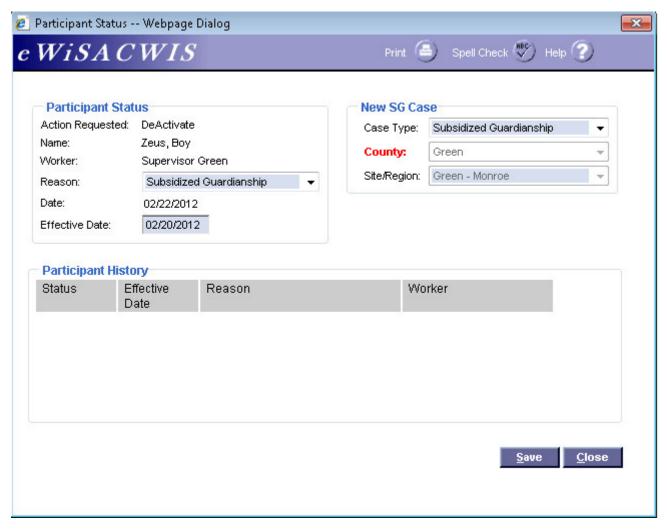


2. On the Maintain Case page, select the DeActivate hyperlink for the child who is to be deactivated for reason of Subsidized Guardianship.



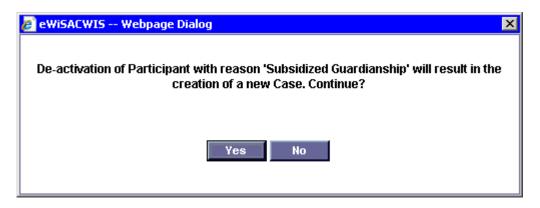
3. On the Participant Status page, select 'Subsidized Guardianship' from the Reason drop-down field. The Effective Date field will populate with the date that was entered in the Hearing/Legal Status Date field on the Legal Status page. The date can be modified, but cannot be prior to the Hearing/Legal Status Date recorded on the Subsidized Guardianship legal status record.

**Note:** This Effective Date will be the Begin Date for the Subsidized Guardianship Service that is created by an overnight eWiSACWIS process.

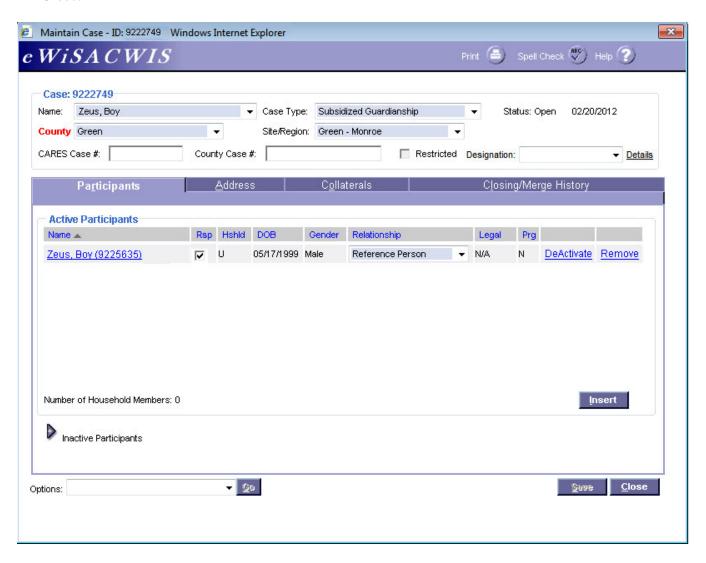


- 4. In the New SG Case group box, the Case Type, County, and Site/Region will pre-fill from the Maintain Case page. Once you have verified all information is accurate, click Save.
- 5. Selecting Save will ensure eWiSACWIS has the necessary information to create the Subsidized Guardianship Service. In order to get this information, eWiSACWIS processes the following edits:
  - Ensures eWiSACWIS pulls the Subsidized Guardianship provider and the payment amount: eWiSACWIS verifies the child and case have an approved Subsidized Guardianship Agreement. If the agreement is missing, pending, or not approved an error message will display.
  - Ensures that AFCARS errors have been corrected: eWiSACWIS verifies that the child does not have any AFCARS/Foster Care ticklers.
  - Ensures that the provider identified on the Subsidized Guardianship Agreement has Subsidized Guardianship Service Types: If the provider does not have the Subsidized Guardianship service types, an error message will display.
  - Ensures that the child's age is under 18: eWiSACWIS verifies that the child is not over the age of 18.

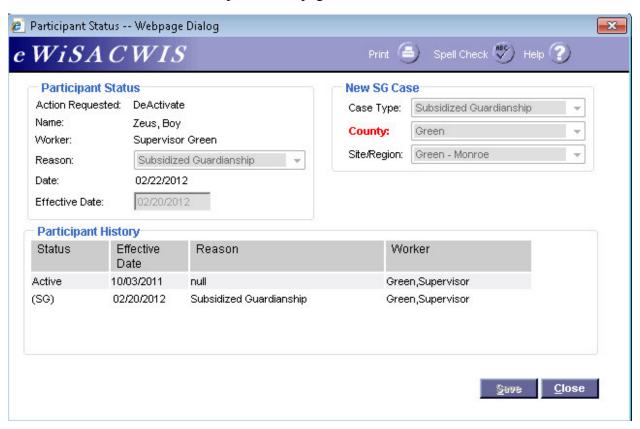
- Verifies the child and case have the following imaging records created under the Subsidized Guardianship category and the Date of Document falls in the past six months (based on current system date):
  - BadgerCare+/Medicaid Health Insurance Form (F-10115)
  - Guardianship Order
  - Initial Court Order
  - Most Recent Court Order
  - Signed Subsidized Guardianship Agreement (DCF-F-CFS2365-E)
  - Signed UFCR Setting (DCF-F-CFS834-E)
  - Signed Subsidized Guardianship Eligibility Determination and Permanency Plan Addendum (DCF-F-2691-E).
- Verifies that the child and case have a legal status record that has a) Legal Action as 'Subsidized Guardianship', b) New Legal Status as 'Guard. To Relative/Caretaker (48.977)', and c) Result as 'Petition Granted.'
- 6. Once you click the Save button, the following pop up message will appear. Click the Yes button if you want to continue with the Subsidized Guardianship process.



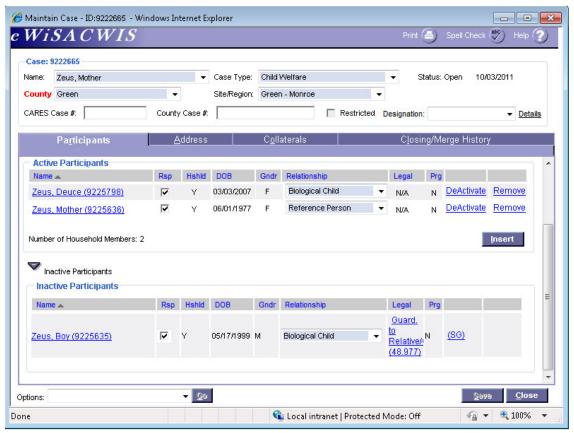
7. Selecting Yes to the above question will automatically create a new case for the child who has been deactivated and will immediately display the Maintain Case page for the new case. In addition, the Subsidized Guardianship case will automatically be assigned to the worker who deactivated the child (and to the State Subsidized Guardianship Default Worker for Milwaukee only) as soon as the above steps are completed. The child's new case will appear on the desktop of the worker that deactivated the child for reason of 'Subsidized Guardianship' (except for Milwaukee County workers). Click Close.



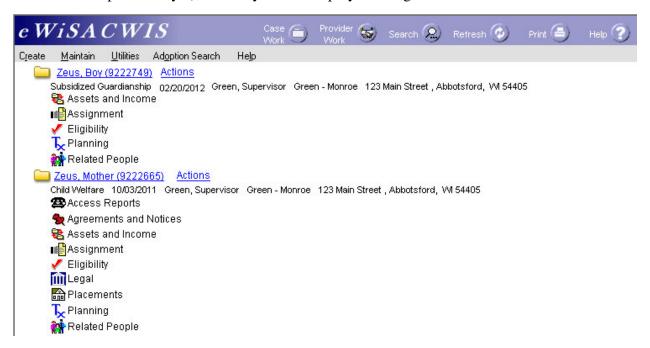
8. You will be returned to the Participant Status page. Click Close.



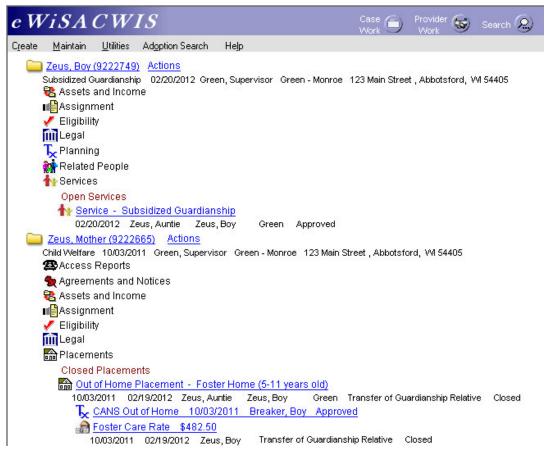
9. You will return to the Maintain Case page where the subsidized guardianship child is now listed as an inactive participant. Click Close to return to your desktop.



10. The information specific to the child in the family case will be copied over to the child's Subsidized Guardianship case through an overnight eWiSACWIS process. The process ends the Out of Home Placement in the biological family case and creates a Service with a Subsidized Guardianship service type in the Subsidized Guardianship case. To access the Subsidized Guardianship case (without the information copied over yet), refresh your desktop by clicking the Cases icon.

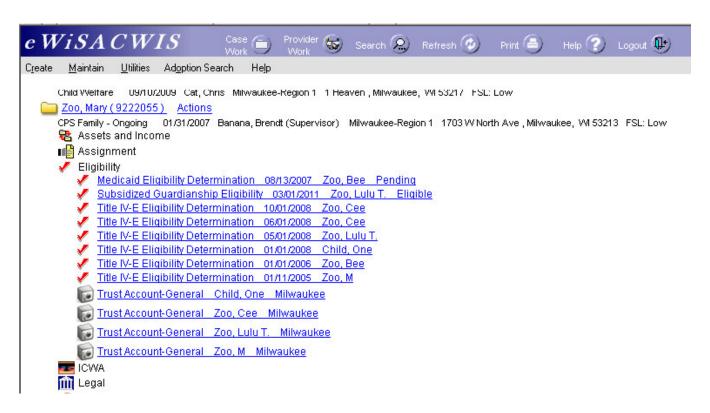


11. Once the overnight process has occurred, you can access the Subsidized Guardianship case with the copied information.



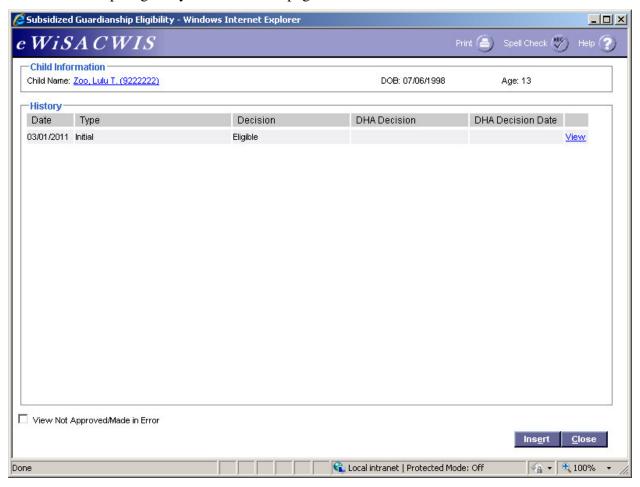
#### **Documenting an Annual Review Determination or a Change in Circumstance(s)**

1. To document the annual review of continued Subsidized Guardianship eligibility [or a change in circumstance(s)], access the Subsidized Guardianship Eligibility page by clicking the Subsidized Guardianship Eligibility link under the Eligibility section of the child's Subsidized Guardianship case.

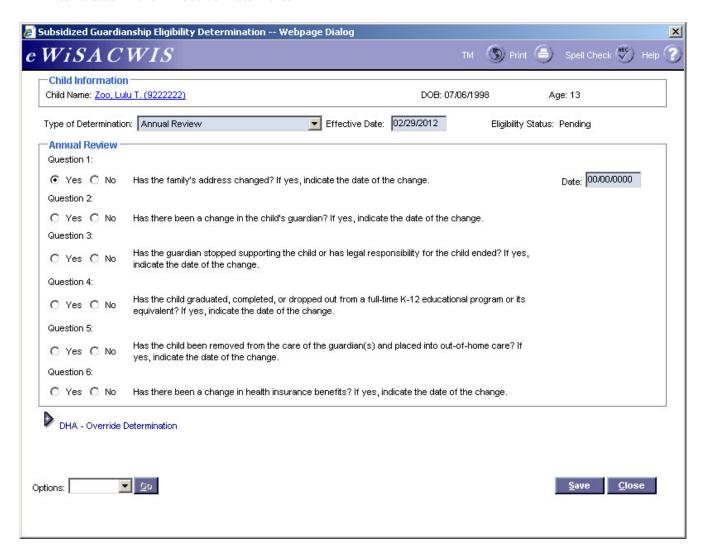


**Note:** If this is the first determination being documented for the child (an initial determination does not exist), create a new Subsidized Guardianship Eligibility page by selecting Subsidized Guardianship Eligibility from the Eligibility drop-down on the Create Case Work page.

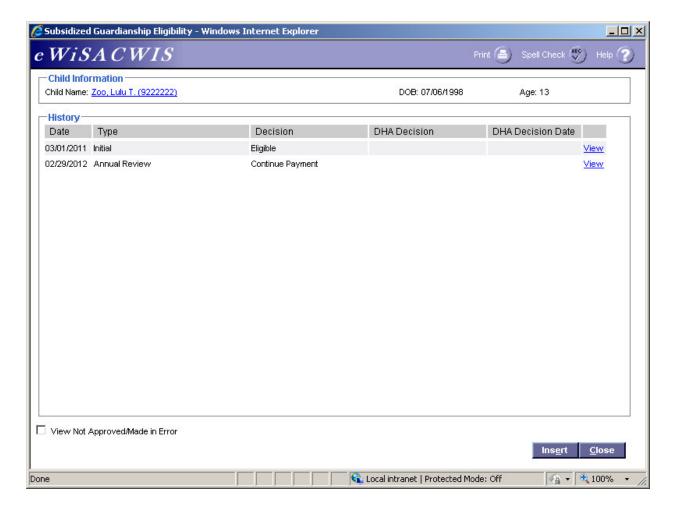
2. Click the Insert button on the Subsidized Guardianship Eligibility page to open a new Subsidized Guardianship Eligibility Determination page.



3. Select Annual Review [or Change in Circumstance(s)] from the Type of Determination drop-down. Enter a date in the Effective Date field.



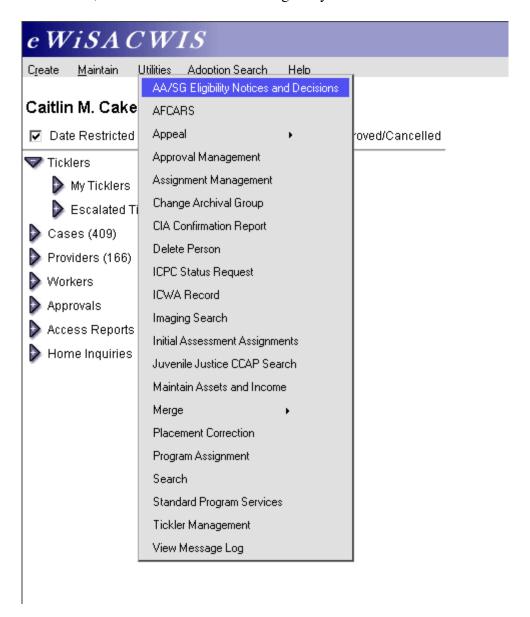
- 4. Make the appropriate Yes or No selection for each question. When a question is answered Yes, a Date field will be displayed beside that question. When the Date field appears, a date is required.
- 5. Once all of the questions have been answered Yes or No, click the Save button. The Eligibility Status will be updated to 'Continue Payment', 'Suspend Payment', or 'Terminate.'
- 6. After the Eligibility Status has been determined, the determination record can be approved. Select Approval from the Options drop-down and click Go. On the Approval History page, select the Approve radio button and click Continue. You are returned to the Subsidized Guardianship Eligibility Determination page. Click Save to send the determination for approval to your supervisor.
- 7. Click Close to return to the Subsidized Guardianship Eligibility page.



8. Click Close to return to the desktop.

#### **Subsidized Guardianship Notices and Decisions**

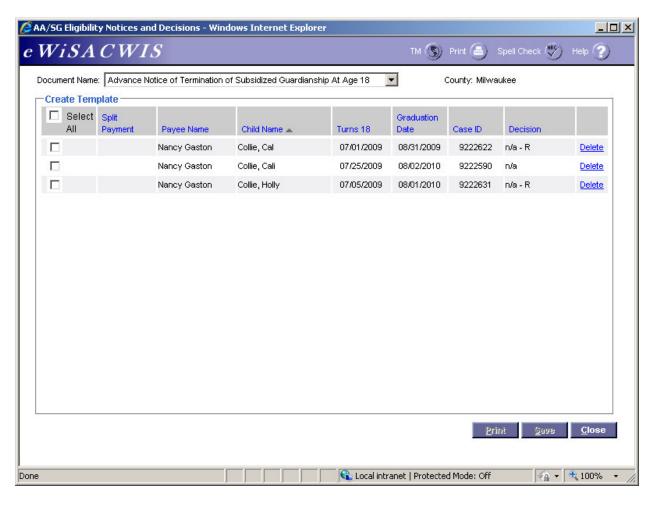
1. There are two forms that are must be sent out to the guardians when the child is approaching age 18. To access these forms, select Utilities > AA/SG Eligibility Notices and Decisions.



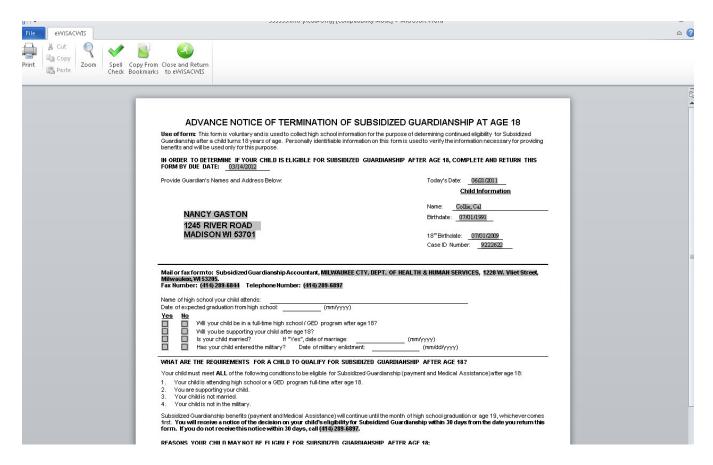
2. On the AA/SG Eligibility Notices and Decisions page, select the Document Name of Advance Notice of Termination of Subsidized Guardianship At Age 18. The page will refresh and identify those children from your county that are expected to turn 18 in 120 days. Select the Select All checkbox to select all or select the checkbox next to each of the children you will be sending the notification for. After your selections have been made, click the Print button. This will open the documents for all of the children.

**Note:** This notice is used to collect high school information for the purpose of determining continued eligibility for Subsidized Guardianship after a child turns 18 years of age.

**Note:** If the notice should not be sent, click the Delete hyperlink next to the associated notice. Click Yes to the pop-up to permanently remove the notice. This will remove the notice from the list and no copy will be saved.



3. Click the Print button to print all of the notifications. Then click the Close and Return to eWiSACWIS button.

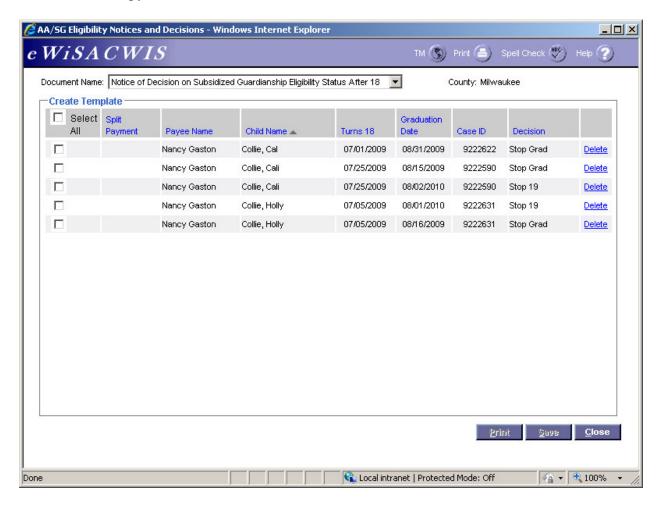


4. On the AA/SG Eligibility Notices and Decisions page, click the Save button. This will remove the notifications from the list and update the SG Eligibility Notices and Decisions Template History group box on the Subsidized Guardianship Eligibility Determination page and indicate they have been sent/printed.

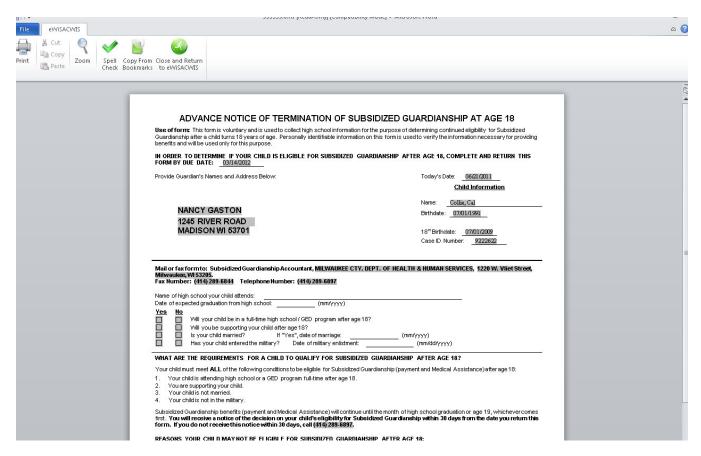
5. On the AA/SG Eligibility Notices and Decisions page, select the Document Name of Notice of Decision on Subsidized Guardianship Eligibility Status After 18. The page will refresh and identify those children from your county that are expected to turn 18 in 60 days. Select the Select All checkbox to select all or select the checkbox next to each of the children you will be sending the notification for. After your selections have been made, click the Print button. This will open the documents for all of the children.

**Note:** This form is used to notify guardians of their child's eligibility for Subsidized Guardianship after a child turns 18 years of age.

**Note:** If the notice should not be sent, click the Delete hyperlink next to the associated notice. Click Yes to the pop-up to permanently remove the notice. This will remove the notice from the list and no copy will be saved.



6. Click the Print button to print all of the notifications. Then click the Close and Return to eWiSACWIS button.



7. On the AA/SG Eligibility Notices and Decisions page, click the Save button. This will remove the notifications from the list and update the SG Eligibility Notices and Decisions Template History group box on the Subsidized Guardianship Eligibility Determination page and indicate they have been sent/printed.

# Documenting a Determination When the Child is Over Age 18

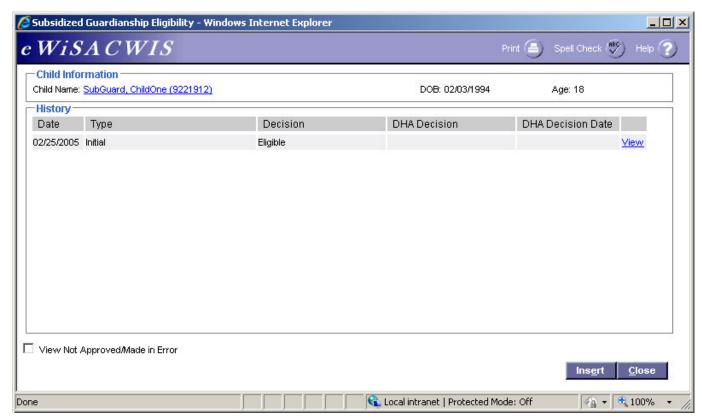
When a child is approaching or is over the age of 18 years, continued subsidized guardianship eligibility needs to be established.

1. To document the determination for a child who is over 18 years of age, access the existing Subsidized Guardianship Eligibility page by clicking the hyperlink under the Eligibility section of the child's Subsidized Guardianship case.

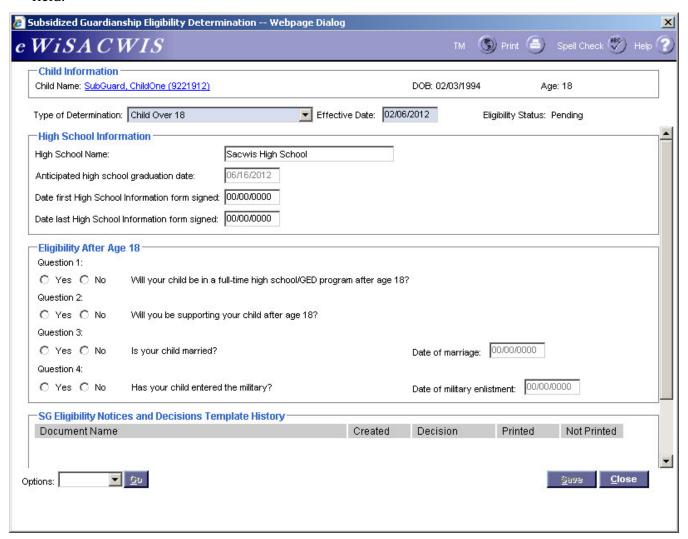


**Note:** If this is the first determination being documented for the child (an initial determination does not exist), create a new Subsidized Guardianship Eligibility page by selecting Subsidized Guardianship Eligibility from the Eligibility drop-down on the Create Case Work page.

2. Click the Insert button on the Subsidized Guardianship Eligibility page to launch a new Subsidized Guardianship Eligibility Determination page.

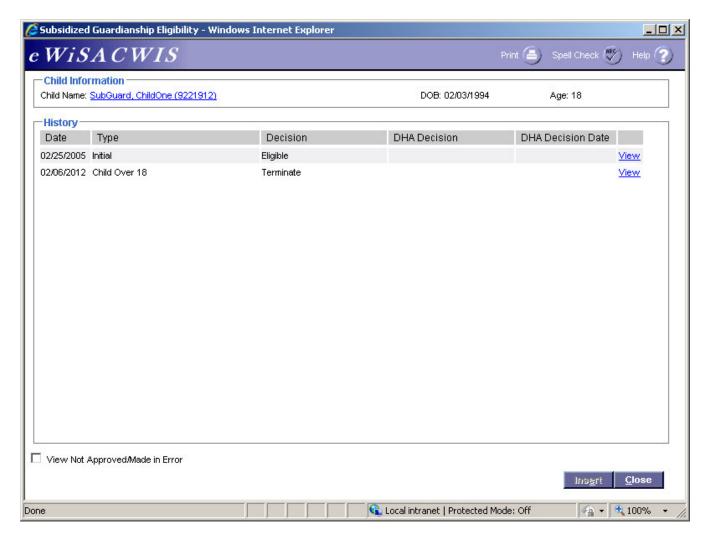


3. Select Child Over 18 from the Type of Determination drop-down. Enter a date in the Effective Date field.



- 4. Make the appropriate Yes or No selection for each question listed on the page. Once all of the questions have been answered, click the Save button. The Eligibility Status will be updated to either 'Continue Payment' or 'Terminate.'
- 5. If the child is 4 months from his or her 18<sup>th</sup> birthday, eWiSACWIS automatically creates the forms notifying the family of advance notice to terminate the Subsidized Guardianship eligibility at age 18. The forms for the child will automatically display in the SG Eligibility Notices and Decisions Template History group box. You can launch these templates from the AA/SG Eligibility Notices and Decisions page off of the Utilities menu if they have not been printed. If additional notices need to be created, click the Insert button and select the appropriate document.
- 6. Once the eligibility status has been determined the determination record can be approved. Select Approval from the Options drop-down and click Go. On the Approval History page, select the Approve radio button and click Continue. You are returned to the Subsidized Guardianship Eligibility Determination page. Click Save to send the determination for approval to your supervisor.

7. Click Close to return to the Subsidized Guardianship Eligibility page.



8. Click Close to return to your desktop.

### Documenting a Determination When the Child is Over 19

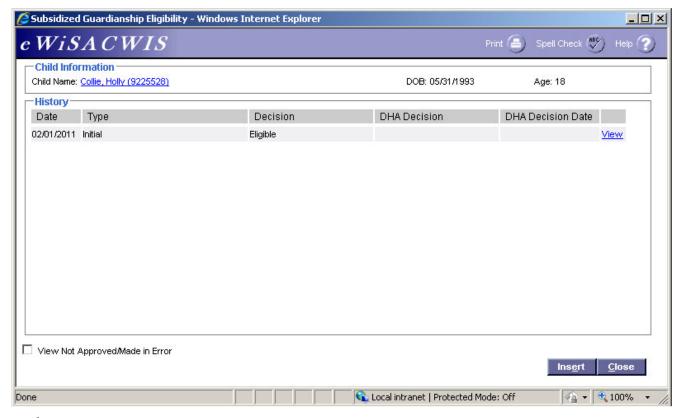
When a child is approaching or is over the age of 19 years, continued subsidized guardianship eligibility needs to be established.

1. To document the determination for a child who is over 19 years of age, access the existing Subsidized Guardianship Eligibility page by clicking the hyperlink under the Eligibility section of the child's Subsidized Guardianship case.

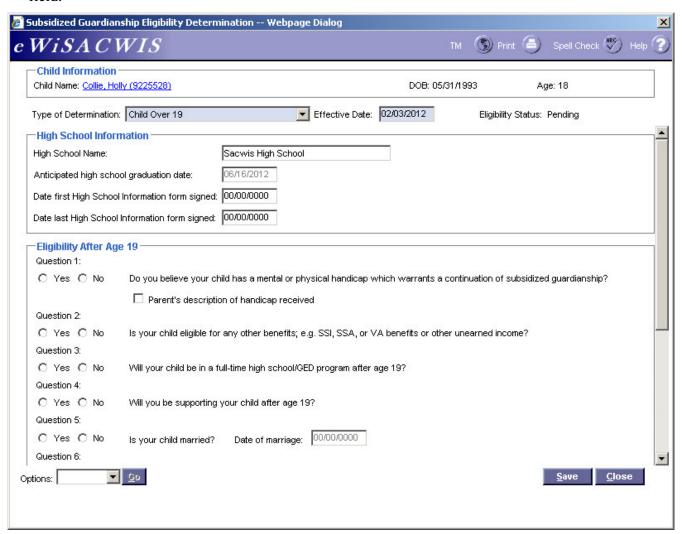


Note If this is the first determination being documented for the child (an initial determination does not exist), create a new Subsidized Guardianship Eligibility page by selecting Subsidized Guardianship Eligibility from the Eligibility drop-down on the Create Case Work page.

2. Click the Insert button on the Subsidized Guardianship Eligibility page to launch a new Subsidized Guardianship Eligibility Determination page.

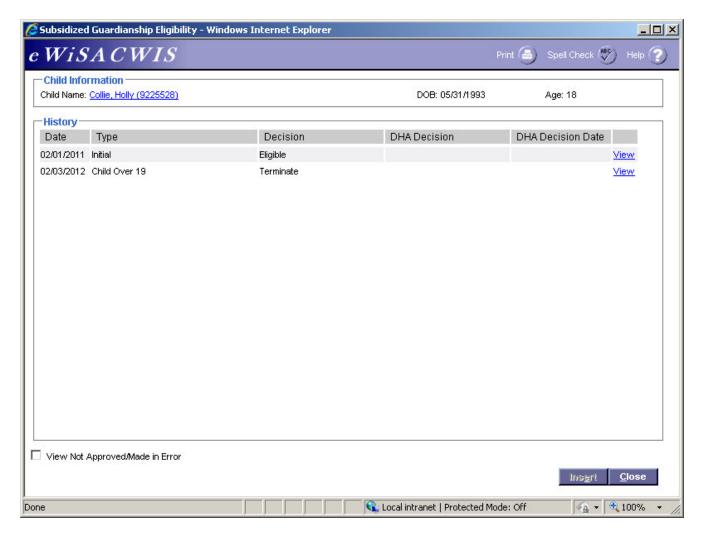


3. Select Child Over 19 from the Type of Determination drop-down. Enter a date in the Effective Date field.



- 4. Once all of the questions have been answered Yes or No, click the Save button. Once the system has determined that all of the questions have been answered Yes or No, the Eligibility Status will be updated to either 'Continue Payment' or 'Terminate.'
- 5. eWiSACWIS automatically creates the forms notifying the family of advance notice to terminate the Subsidized Guardianship eligibility at age 18. The forms for the child will automatically display in the SG Eligibility Notices and Decisions Template History group box. You can launch these templates from the AA/SG Eligibility Notices and Decisions page off of the Utilities menu if they have not been printed. If additional notices need to be created, click the Insert button and select the appropriate document.
- 6. Once the eligibility status has been determined the determination record can be approved. Select Approval from the Options drop-down and click Go. On the Approval History page, select the Approve radio button and click Continue. You are returned to the Subsidized Guardianship Eligibility Determination page. Click Save to send the determination for approval to your supervisor.

7. Click Close to return to the Subsidized Guardianship Eligibility page.



8. Click Close to return to your desktop.

# Reactivating a Child After Subsidized Guardianship Ends

When a Subsidized Guardianship case is closed, the 'ReActivate' hyperlink will appear in the biological family case (Inactivate Participants group box). Select the ReActivate hyperlink to open the Participant Status page. Once the Participant Status page is completed and saved, the child's status will change to 'Active' which will allow workers to create case work for the child again in the family case.

